

SPMS Subcontracting Plan Management System



User Manual for Contract Specialists

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1 Introduction

1.1 What is SPMS?

The **S**ubcontract **P**lan **M**anagement **S**ystem (SPMS) automates the submission and approval of Small Business Subcontract Plans for the Defense Energy Support Center (DESC).

- Offerors can use SPMS to create and submit plans to DESC for approval.
- Approving officials (Contract Specialists, Contracting Officers and Small Business Specialists) can use SPMS to view, sign and approve plans through the stages of the approval process.
- Contract Officers can use SPMS to load contracts into the system and incorporate approved plans into actual contracts.
- Small Business Specialists can use SPMS to monitor the plan submission process, perform contract reviews and load contractors' Subcontract Reports (Standard Forms 294 and 295) into the system.
- SPMS provides automated email reminders and online reports to all different user roles to help facilitate the electronic processes.

1.2 User Roles

SPMS uses a role-based electronic approval system. Each user role has a different set of responsibilities. Therefore, each user role is authorized to use a specific set of functions within the system. Some functions behave differently depending on the user that is performing them, and not all functions are available for each user role. The roles are as follows:

- **Offeror** – The Offeror, sometimes referred to as the Prime Contractor, is a non-government employee who is responsible for submitting subcontracting plans. They can submit plans for more than one company or corporate profit center within a company.
- **Contract Specialist** – The Contract Specialist, abbreviated as CS, is a DESC employee who is responsible for the initial review of the plan. They decide whether or not to forward it on to a Contracting Officer for further review, or return it to the Offeror for rework. Contract Specialists are assigned to one of the Commodity Business Units (CBU) and can review any subcontracting plan that is submitted within their CBU.

- **Contracting Officer** – The Contracting Officer, abbreviated as CO, is a DESC employee who has the primary decision-making authority for approving subcontracting plans. They review the plan at several stages: Initially when the plan is forwarded to them by the Contract Specialist they decide whether or not to “accept” the plan and forward it to the next level of review. Second, if the plan requires a 2nd-level signature authority they are responsible to approve it. Finally, after the Small Business Specialist has reviewed the plan, they decide whether or not to grant it final approval and incorporate it into a contract. The Contracting Officer is also responsible for maintaining the contracts stored within SPMS. Contracting Officers are assigned to one of the Commodity Business Units (CBU) and are responsible for all plans that are submitted within their CBU.
- **Small Business Specialist** – The Small Business Specialist, abbreviated as DU, is a DESC employee from the DESC-DU Small Business Office. They review subcontracting plans that have been forwarded to them by the Contracting Officer and return their recommendations. The Small Business Specialist is responsible for monitoring the plan submission process to ensure compliance. They are also responsible for performing contract reviews and for loading subcontract reports (forms SF294 and SF295) received from contractors into SPMS.
- **Administrator** – The Administrator is responsible for assigning users, loading electronic signatures into the system, assigning companies and corporate profit centers, assigning SBA representatives, monitoring and setting email routing, and maintaining the data within the system.

1.3 Scope

This user manual provides responsibilities and functions for Contract Specialists only. Responsibilities and functions for Offerors, Contracting Officers, Small Business Specialists and Administrators are discussed in other user manuals.

1.4 Document Organization

The different sections of this user manual correspond to each of the user roles. To find information on a specific function, please go to the section that relates to the specific user role you are performing in SPMS.

2 Accessing SPMS Welcome Screen

Anyone with access to the Internet can access the SPMS welcome screen by navigating to <https://spms.desc.dla.mil>. You may access SPMS using Internet Explorer 5.5 or higher or Netscape Navigator 4.7 or higher. Once you access SPMS, you will see the screen shown in Figure 1.

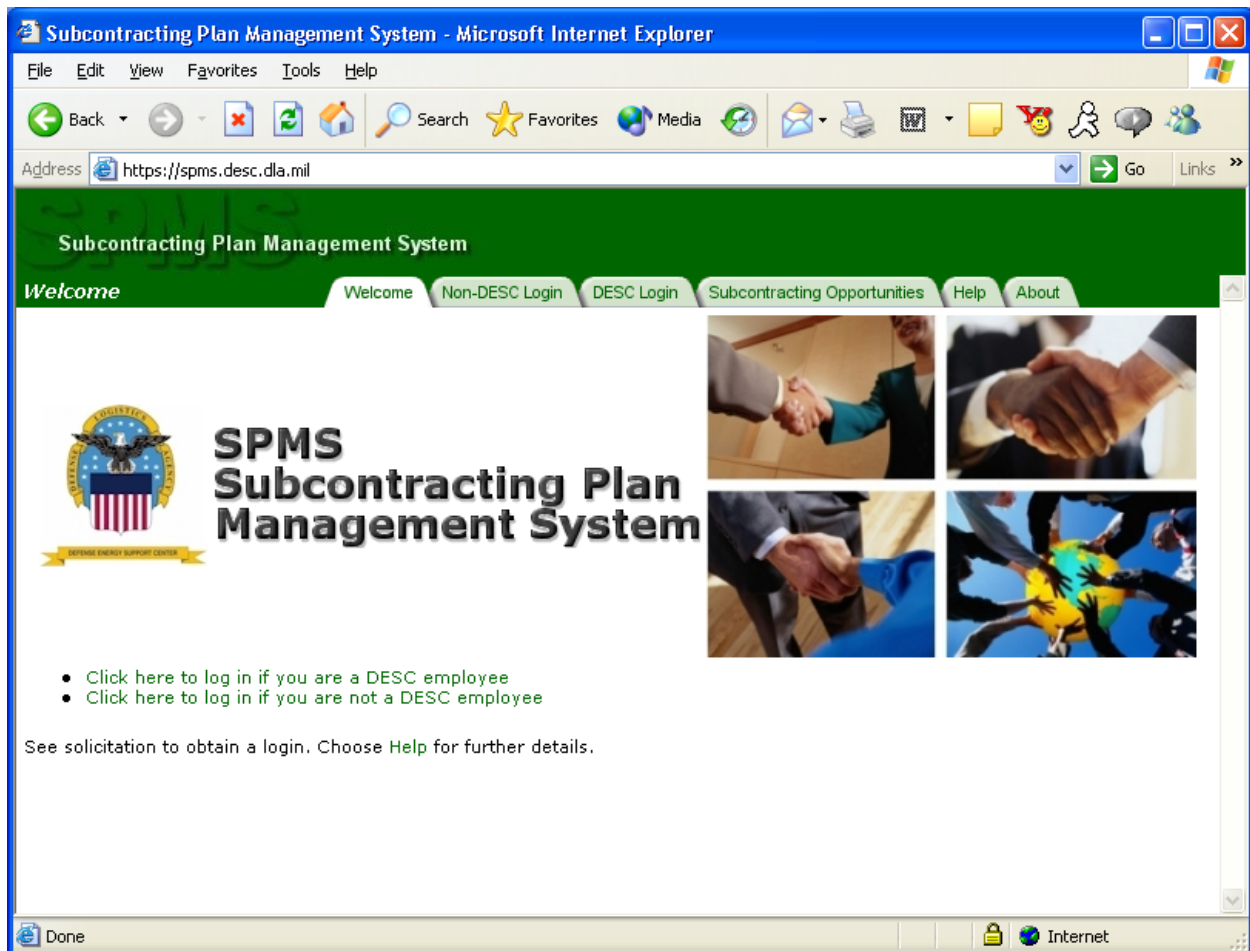


Figure 1: The SPMS welcome screen

3 Logging On to SPMS

If you have a SPMS User ID, you can log into SPMS using one of two methods. After establishing your account, the SPMS Administrator will advise you which login method is appropriate for you.

3.1 Requesting a User ID

You must obtain a SPMS User ID before you can log into SPMS. To obtain a User ID, you must submit a DESC System Access Request using the SPMS system (<https://spms.desc.dla.mil>). For assistance, contact the DESC Help Desk at 1-800-446-4950.

In addition to a User ID and Password, you may also need to submit your signature to DESC so that it can be used to electronically sign forms. The SPMS Administrator will instruct you on the necessary procedures.

3.2 DESC Login

This login method is appropriate for users who have a DESC network User ID and Password. To log in this way, click on the tab labeled “DESC Login” then click the blue button labeled “Log In.” The system may display a gray log in box that prompts you to enter your domain/DESC network user name and password. Enter your DESC network user ID and password; then click the ‘OK’ button on the gray box. SPMS will verify your information and then direct you to the ‘Welcome to SPMS’ screen.

3.3 Non-DESC Login

This login method is appropriate for users who do not have a DESC network User ID and Password. To log in this way, you must use the SPMS User ID and Password that were assigned to you by the SPMS Administrator. Click on the tab labeled “Non-DESC Login” and input your User ID and Password. SPMS will verify your information and direct you to the ‘Welcome to SPMS’ screen.

4 System Navigation

Once you have successfully logged in to SPMS, it will display the ‘Welcome to SPMS’ screen. Figure 2 displays the ‘Welcome to SPMS’ screen that you will see after logging in.

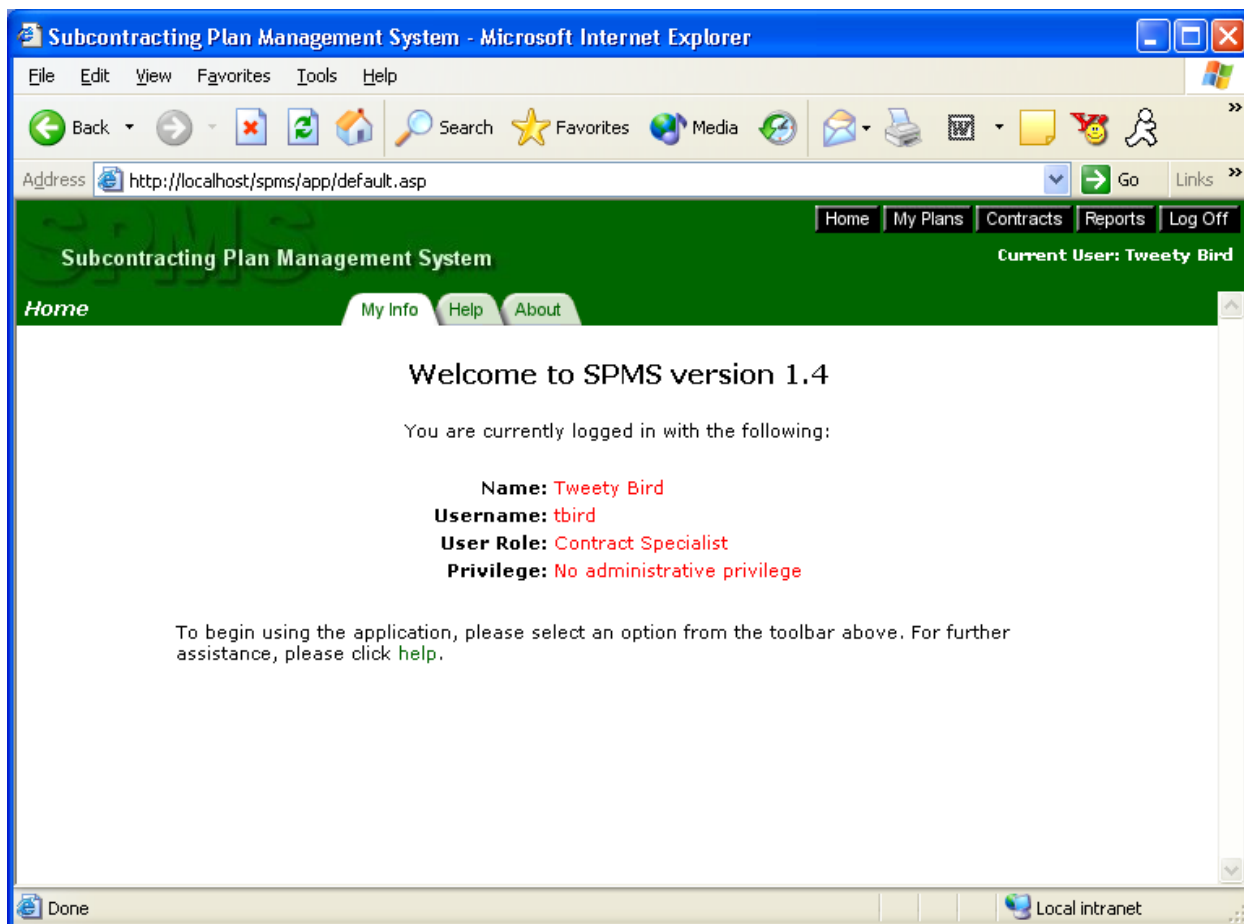



Figure 2: The 'Welcome to SPMS' screen appears after you have successfully logged in.

Across the top is the SPMS navigation toolbar that will be displayed throughout your SPMS session so you can easily navigate through the system's functionality. Each button on the toolbar selects a different functional grouping within the system. Letting the cursor hover briefly over a button will display a short description of each function. Along the bottom of the navigation toolbar are a series of green tabs, which represent the different functions that can be performed within the selected functional grouping. The function that is currently selected is displayed with a white tab, and the other functions are displayed with light green tabs. Below this banner is a large working area to perform the selected function.

Many screens in SPMS display a help symbol (🔍) next to a topic. Clicking this icon will open a screen with help information on that topic.

Figure 5 is an example of the welcome screen for the Contract Specialist user role. This screen can be returned to at any time by selecting the Home button on the toolbar. The far right section of the toolbar displays the user's name. The working area displays the user's full name, SPMS username, user role, and administrative privileges.

5 Home button

The 'Home' functional group () returns you to the 'Welcome to SPMS' screen and displays other system information. The functions include:

- My Info
- Help
- About
- Change Password (available for Non-DESC logins only)

To access one of these functions, move your cursor over the tab on the toolbar and click your left mouse button. The following sections discuss the functions.

5.1 My Info

Clicking on the 'My Info' function displays the 'Welcome to SPMS' screen, which is the first screen you will see after logging in. This screen provides you with all of the necessary information to know what privileges you have in SPMS. This screen displays the user's full name, SPMS username, user role, and administrative privileges.

5.2 Help

The 'Help' function displays system requirements and information on obtaining help.


5.3 About

The 'About' function displays system version and release date information.

5.4 Change Password

This function is available for users who log in using the 'Non-DESC' login button. When you first log into SPMS, you should use this function to change the password given to you by the SPMS administrator. Your password must consist of alphanumeric characters (a-z, A-Z, 0-9) and it is case-sensitive.

6 Reviewing Subcontracting Plans

The 'My Plans' () functional group provides all the functions necessary to review the subcontracting plans within your CBU. There is only one screen within this group from which you can perform the necessary review and approval actions.

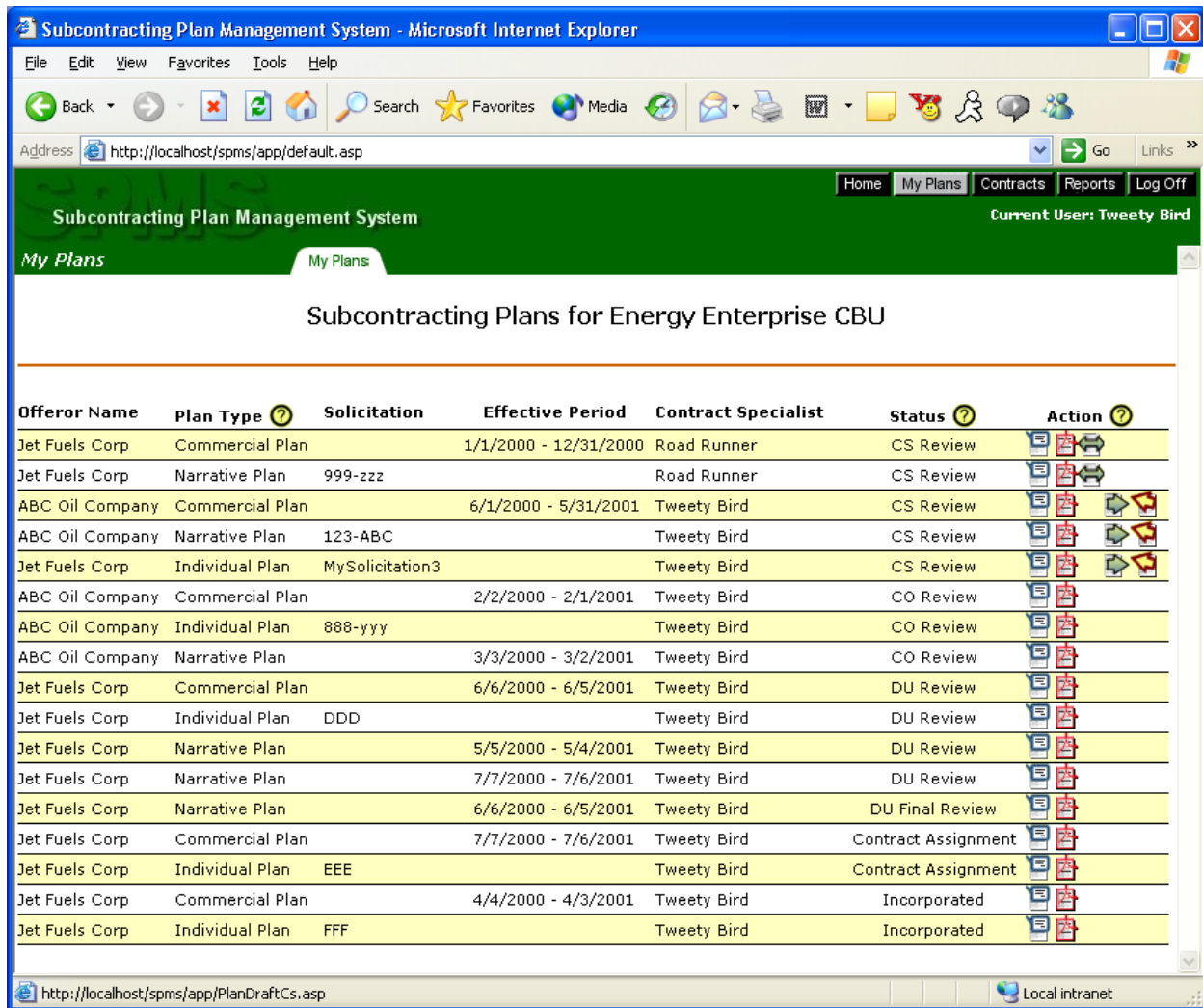


Figure 3: The 'My Plans' function displays all plans that have been submitted within the Contract Specialist's CBU.







6.1 My Plans Screen Overview

The 'My Plans' function displays a list of all subcontracting plans that have been submitted to your CBU. The list includes plans that require your attention, as well as plans that are in another stage of review and do not require your attention. This allows you to monitor the plans through the approval process and to make the appropriate actions when necessary. The left portion of the screen lists information on the plans. The right portion of the screen provides a series of icons to perform actions on the plan listed in that row. The columns include:

- **Offeror Name** – This is the name of the company or corporate profit center for which the plan was created. It is possible to create plans for several different companies or corporate profit centers within a company.
- **Plan Type** – This lists the type of plan.

- Solicitation – This lists the solicitation number for which the plan is being submitted.
- Effective Period – This lists the dates for which the plan is active.
- Contract Specialist – The name of the Contract Specialist assigned to review the plan.
- Status – This lists the status of the plan in the review process.

You can perform various actions on a plan using the action icons. Some actions may not be available for each plan, depending on the status of the plan. To perform an action, click the desired icon to the right of the plan. The actions include:

-  View Comments – Displays all comments included on the plan as it was routed between different approving officials.
-  View Plan in Adobe Acrobat – Opens the plan for viewing using Adobe Acrobat PDF format.
-  View Plan – Opens the plan for viewing in plain text format when the Adobe Acrobat PDF format is not available.
-  Reassign – If a plan is currently assigned to another Contract Specialist, reassign it to yourself.
-  Submit Plan – Submits a plan to the next stage of review.
-  Return for Revision – Returns a plan to the previous stage of review.

The following sections discuss the actions.

6.2 Reviewing a Plan

SPMS displays all plans that are in 'CS Review' status and are assigned directly to you at the top of the list. If a plan is in this status, you must take action on the plan by submitting it to the next stage of review, or by returning it for revisions. Use the View and View Comments actions to review the plan and make your decision. When you are ready, use the Submit or Return actions to route the plan accordingly.

6.3 Reassigning a Plan

If a plan is currently assigned to another Contract Specialist and you wish to perform the review yourself, you can reassign the plan to yourself. To reassign the plan, click the 'Reassign' action icon. After being reassigned, the plan will be moved to the top of the

list and the 'Submit for Review' and 'Return for Revision' action icons will be displayed, allowing you to perform the review.

7 Contracts

The 'Contracts' functional group (**Contracts**) provides all the necessary functions to add and upload contracts to SPMS. The functions include:

- Contracts
- Add

To access one of these functions, move your cursor over the tab on the toolbar and click your left mouse button. The following sections discuss the functions.

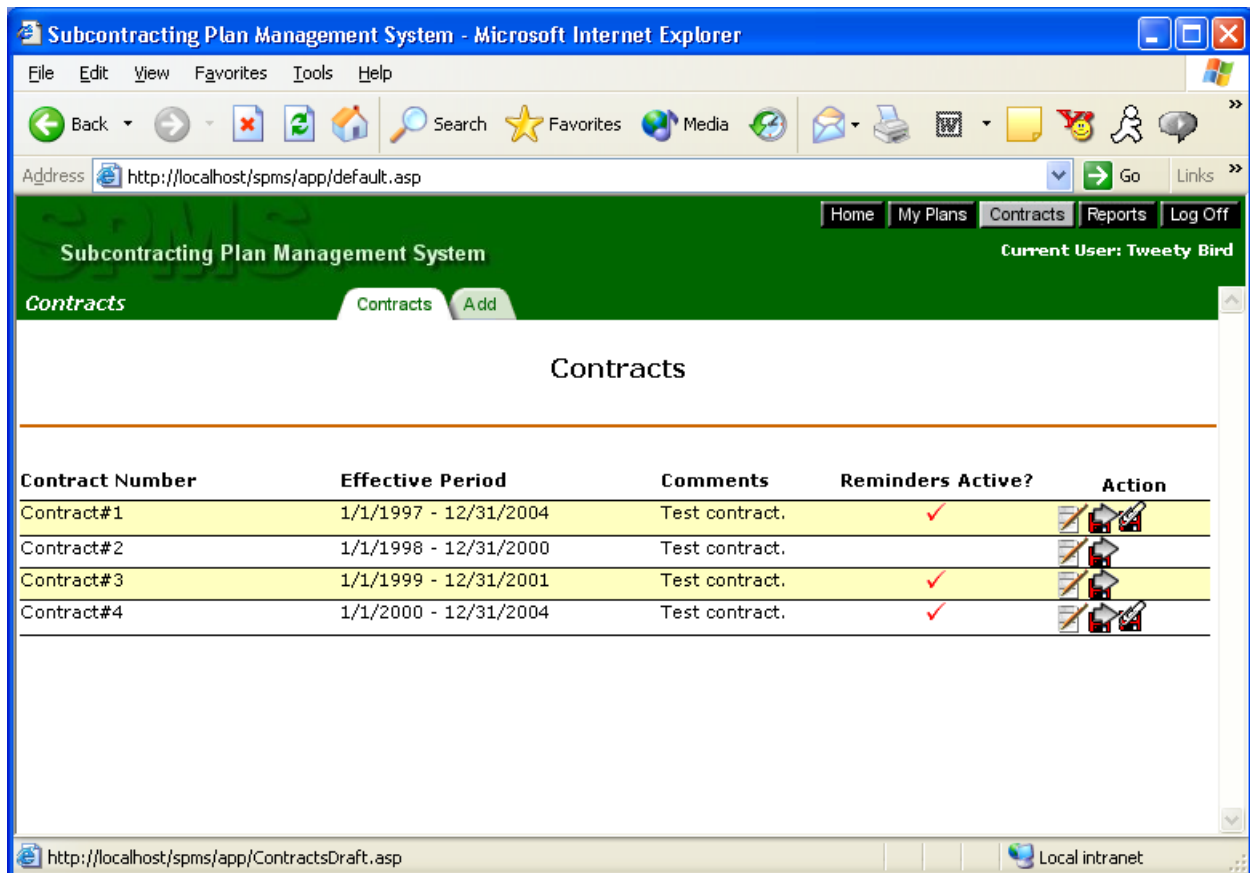





Figure 4: The 'Contracts' screen lists all contracts in the system.

7.1 Viewing Contracts

To view a list of all contracts in the system use the 'Contracts' function. SPMS will display the following columns:

- Contract Number
- Effective Period – This lists the dates for which the contract is active.
- Comments
- Reminders Active – This displays a check mark (✓) if email reminders have been turned on for this contract.


To the right of each contract are the following action icons:

-  Edit – Edit the properties of this contract.
-  Upload – Upload an electronic copy of this contract into SPMS.
-  View – View the contract. This is only displayed after an electronic copy of the contract has been uploaded.


7.2 Adding a Contract


To add a new contract, use the 'Add' function. SPMS will display the 'Add Contract' screen where you can input the contract number, effective dates and comments. If you are entering a modification to a contract, simply include the extra characters for the modification number at the end of the contract number.

The 'DCMA Reminders' checkbox allows you to turn the email reminders feature on or off. When email reminders are turned on, SPMS will automatically send reminder emails to the contract reviewers when a contract is ready to expire. The email reminds them that they will need to perform a contract review, and the emails will continue to be sent at regular intervals until the review has been completed, or the email reminders feature is turned off.


To save the data, click the 'Save' button. SPMS will direct you to the contracts list. You can verify the contract was added by locating it in the list. If you wish to change the data you input, click the 'Edit' icon () to the right of the contract.

7.3 Uploading a Contract

SPMS allows you to upload electronic copies of contracts into the system so that they can be viewed at later date. Before uploading a contract, you will need to convert it to an electronic file. If you have a paper copy of the contract, scan it in using a scanner and save the file to your computer. SPMS accepts all file formats. To upload the file, use the 'Upload' action icon (). SPMS will direct you to an upload screen where you must browse to the file location on your computer and click 'Ok'. After the file has been

uploaded, you will be returned to the contracts list. You can verify the contract was successfully uploaded by clicking the 'View' action icon () to the right of the contract.

8 Reports

The 'Reports' functional group () allows you to view all the reports that you are authorized for. The functions include:

- DCMA 640s

To access one of these functions, move your cursor over the tab on the toolbar and click your left mouse button. The following sections discuss the functions.

8.1 DCMA 640 Forms Report

To view the DCMA 640 Forms Report, use the 'DCMA 640s' function. This report allows you to search for and view DCMA 640 forms that have been uploaded into the system. You may search on Contract Number or Offeror Name.

To generate a report, enter criteria to search against. To search on a text field, you can input a partial name. For example, a contract number of 'C' will bring up all contracts beginning with C. Once you enter the information, click on 'OK' to generate the report or 'Clear' to clear the information without generating the report. When you click 'OK', SPMS will generate a report that matches the criteria.

After the report is generated, you can view the DCMA 640 form by clicking the View icon to the right of the contract. If there are no DCMA 640 forms that have been uploaded for a contract, then no icons will appear next to that contract.

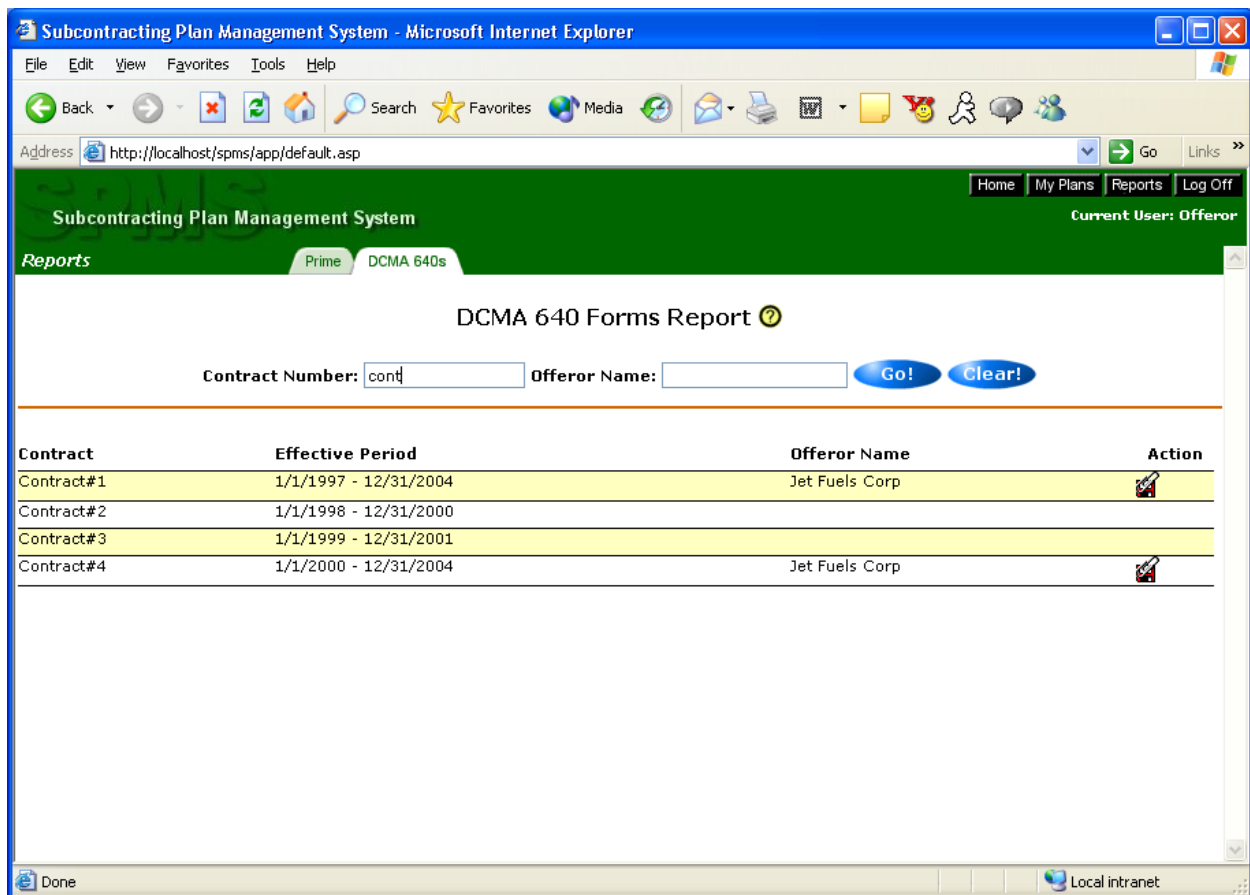


Figure 5: The 'DCMA 640 Forms Report' after searching for contracts.

9 Log Off

If you desire to end your SPMS session, you may do so by clicking the 'Log Off' button (). If you click 'Log Off', SPMS will display a reminder for you to close your browser to ensure completion of the log off process. Click the 'OK' button to continue the log off process.